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Sharon H. Bob

R. Jerome Lee

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THE DEVELOPMENT OF A MODEL STATE TRAINING PROGRAM FOR FINANCIAL AID ADMINISTRATORS IN VIRGINIA

by Sharon H. Bob and R. Jerome Lee

There has been a general recognition and agreement within the student financial aid community that the training and development of administrators has historically been a priority professional need. Agreement has not been reached, however, on *who* should be responsible for training, *what* training curriculum materials should be developed and included, *when* and *how* often training should be conducted, and *where* training should occur to maximize goals of increased knowledge and effectiveness.

Emerging from the current proliferation of training activities is a theoretical "grass roots" model which contains the multiple appeal of cost efficiency, coordination, and cooperation among the various administrators involved in the financial aid process. This article outlines the development and results of that model in Virginia where it originated.

Under the Higher Education Amendments of 1976, incentive grants to the State Scholarship Agencies were provided for the operation of the State Student Financial Assistance Training Program (SSFATP). The SSFATP enables a state's financial assistance agency, in consultation with the statewide organization of financial aid administrators, to design and develop a training program. The amount a state may request for its training program is five percent (or \$10,000, whichever is less) of the state's allotments under each of the Supplemental Educational Opportunity Grant (SEOG), National Direct Student Loan (NDSL), and College Work-Study (CWS) programs.



Dr. Sharon Bob is currently serving as an Education Policy Fellow with the U.S. Office of Education's Office of Legislation. She is presently on leave from her position as Coordinator for Financial Aid Programs for the Virginia Council of Higher Education. Formerly Director of Financial Aid at Montgomery College in Takoma Park, Maryland, Dr. Bob currently serves as a CSS and SASFAA instructional consultant.

R. Jerome Lee is Assistant Regional Director of the College Entrance Examination Board's Southern Regional Office, with primary responsibility for financial aid. He has had extensive experience in the financial aid profession, formerly having served as Director of Financial Aid at Mercer University and Director of State Scholarships and Loans for the Georgia State Scholarship Commission.

Prior to requesting SSFATP training funds for financial aid administrators in 1977-78, a committee composed of the Virginia State Council of Higher Education staff, selected members of the Financial Aid Advisory Committee to the Council, and other individuals drawn from the Virginia Association of Student Financial Aid Administrators' (VASFAA) membership discussed the existing training and professional development opportunities in Virginia. The Committee's overall analysis was that training was available, but that its substance and delivery had many deficiencies. To address the problems that were identified at that time, several activities were proposed and subsequently undertaken in 1977-78 and 1978-79 to remedy the deficiencies.

The original eight member committee became the Planning Committee, charged with the responsibilities for coordinating, planning, and evaluating all aspects of the training program. An implementation committee of 25 people was formed which included the eight members of the Planning Committee and 17 others with particular expertise to offer the program. The implementation committee formed sub-committees to carry out the proposed objectives:

1. *The Needs Assessment Subcommittee* surveyed the training of the financial aid community. This same Subcommittee conducted the evaluation of all training activities in Virginia.
 2. *The Planning for the Workshops Subcommittee* made the site arrangements and obtained the trainers for the workshops.
 3. *The Curriculum Subcommittee* developed the course outlines and a compendium of materials which was used as the training document for the workshops.
 4. *The Uniform Job Description Subcommittee* conducted financial aid office salary and staffing surveys. In addition consensus model job descriptions for various positions within a financial aid office were developed.
 5. *The Graduate Course Proposal Subcommittee* developed the proposal, conducted a survey to determine the need for graduate courses, and presented the information to Virginia Polytechnic Institute and State University.
- It was determined that 1977-78 would be a year of planning and development, while 1978-79 would be the year of implementation.

Initially, the training needs of Virginia financial aid administrators were identified by surveying all levels of the financial aid community in the state. The responses to the survey were tabulated according to types of institutions, years of experience, and job titles. No significant differences were found among the comparisons made.

Topical areas were then rank ordered and two lists were prepared. The following topics were seen as needed, but were not covered by other training programs:

1. Budget Development
2. Accounting, Fiscal Management, Audits
3. Consumerism
4. College Work-Study Program (CWSP)
5. Computers
6. Student Rights
7. Office Management

8. Award Packaging

The following topics were seen as needed, but were covered adequately by other training programs:

1. Federal Application for Funds
2. Basic Grants
3. Financial Need Analysis
4. Guaranteed Student Loans (GSL)

In addition, the survey indicated the following preferences for workshops:

1. Should be held in the summer or fall
2. Should be held in a hotel rather than on a campus
3. Should be in several locations
4. Should cover several topics
5. Should offer graduate credit

With the assistance of a professional writing consultant, a series of 13 course topics and 10 appendices was compiled with the intent of developing a resource document for individuals who are new to the field of financial aid administration. Those subjects identified by the needs survey were included. Consequently, the compendium served a second function: the document became part of the materials provided at the training workshops.

The topics developed as course outlines include:

1. History of Institutional Financial Aid in the United States
2. Principles of the Profession
3. The Political Process and Financial Aid
4. Financial Aid Resources
5. Student Expense Budgets
6. The Uniform Methodology of Need Analysis
7. Award Packaging
8. Counseling
9. Consumerism
10. Management Procedures and Practices
11. Forms
12. Fiscal Audit and Program Review Techniques
13. Data Collection and Processing

The following Appendices were also included:

1. Glossary of Terms
2. Bibliography of Financial Aid
3. Forms
4. NASFAA's *Institutional Guide for Financial Aid Self-Evaluation*
5. U. S. O. E. Region III Organization Chart
6. *Student Financial Aid Handbook*
7. Virginia College Work-Study Program
8. *Accounting, Recordkeeping, and Reporting By Colleges and Universities For Federally Funded Student Financial Aid Programs* (The "Blue Book") DHEW, 1977
9. *Proceedings of the Conference on Student Aid Concerns*, Southern Association of Student Financial Aid Administrators, 1977

The members of the Planning Committee assessed the results of the needs survey and comments received from the members of the Implementation Committee. As a result, a two-track training program (i.e. *new* financial aid administrators or support staff, and *experienced* financial aid administrators) was offered in two locations in Virginia. This approach provided easy accessibility and drive-in capabilities for most participants. The format of the training program provided for a coordinated training effort with the annual College Scholarship Service (CSS) Need Analysis Workshop.

The method of instruction involved team teaching and the small group approach. Instructors were selected on the basis of expertise or knowledge in a particular administrative specialty. As a result, the instructors who were chosen involved a mixture of Virginia aid administrators and practitioners from outside the state.

After the workshops, all participants were asked to evaluate the training, the instructors, and the materials. The overall results of the assessment indicated that the workshops were considered "good" to "excellent" with major proficiency increases reported in the area of need analysis and in understanding the values of others. The preferred training vehicle appeared to be small groups established on the basis of experience. There was significant interest in further training emphasizing such "basics" as need analysis, packaging, consumer information, and updates and changes in regulations.

The activities described thus far would have met the objectives outlined in the SSFATP federal regulations. However, the Planning Committee was committed to exceed the minimal requirements. Enhancing the total professional development of Virginia aid administrators involved salary improvements, position upgrades, and obtaining additional education credentials.

A survey was conducted in 1977-78 to determine the size and composition of the financial aid staffs in Virginia. Comparisons were then made with Van Dusen and O'Hearne's guidelines in *A Design for a Model Financial Aid Office*.¹ It was evident that aid offices were understaffed both at the support and at the professional levels. During that same year, a salary survey was conducted. Comparisons using national norms indicated that financial aid administrator salaries at all types of institutions in Virginia were below the national average.

One major problem identified in Virginia which confronted the public sector was the fact that under the state classification system, no jobs titles and descriptions existed which adequately or accurately reflected the position of financial aid director or financial aid associate director. Consensus models were therefore developed to identify the various job responsibilities for financial aid administrators in all sectors of higher education.

The uniform job descriptions or consensus models, along with the results of the salary and staffing surveys, were presented to the appropriate State agencies and officials for their consideration and possible adoption. Officials

¹William Van Dusen and John J. O'Hearne, *A Design for a Model College Financial Aid Office*, College Entrance Examination Board, New York, 1973.

associated with the private sector were also provided copies of the descriptions for use, as appropriate, within their individual institutions.

As another means of increasing the professional development of financial aid administrators, a graduate curriculum proposal was developed and offered, along with survey results which showed the need for such a curriculum, to Virginia Polytechnic Institute and State University. The College of Education at Virginia Polytechnic Institute and State University is now offering an Institute on Financial Aid Administration which provides a series of graduate credit courses. This accomplishment will allow individuals to obtain the "credentials" needed to achieve additional status in the academic community.

One major function of the model training program is to conduct continuous evaluations and need assessments. The following four new activities have been identified by the Planning Committee to meet the objectives of the SSFATP in Virginia:

1. *Consulting Services* — It was recommended that one means of improving the proficiency of the state's financial aid administrators would be to offer technical assistance through individual consulting services to those institutions which identified particular needs or problems.

2. *Guide for State Financial Aid Self-Evaluation* — It was recommended that a guide and self-evaluation document for administering the Virginia state programs be developed as an appendix to the National Association of Student Financial Aid Administrators' *Institutional Guide for Financial Aid Self-Evaluation*.

3. *Middle Income Student Assistance Act Staffing Survey* — It was recommended that an additional staffing survey be conducted to assess the increased staffing demands resulting from the expansion of aid programs through recent passage of MISAA.

4. *State-wide Financial Aid Consumer Brochure* — It was recommended that a comprehensive consumer brochure be developed for residents of Virginia to assist in the dissemination of good, accurate financial aid information.

Prior to the SSFATP, various forms of financial aid training were being provided. Those activities were informative and useful but not always coordinated. In addition, they did not always meet the particular needs of either the less experienced or more experienced financial aid officers.

As has been described, the SSFATP training activities were coordinated with two previously separate activities: the annual College Scholarship Service Need Analysis Workshop, and the VASFAA meetings. This effort of coordination not only increased the professional proficiency of the aid administrator, but served to alleviate the geographic and financial restraints on travel. The only training activity in Virginia which was not coordinated with the SSATP was the Student Financial Assistance Training Program offered by the U. S. Office of Education, which did not provide for any state coordination. The ultimate goal in Virginia is total coordination of all training activities.

The coordinated effort in Virginia had additional benefits. One significant result was the cooperative environment which developed across all sectors of higher education, including state agencies. A second benefit was the cost effectiveness achieved in having a state design and implement a training program. The entire training model was accomplished with a minimal expenditure of funds. Due to the flexibility allowed by a state effort, a third benefit resulting from the project was that localized training needs were identified and met satisfactorily.

The training model developed in Virginia has resolved the issues of *who* should train, *what* materials should be included, *when* training should be conducted, and *where* training should occur. This model of state-wide financial aid training has succeeded in meeting the needs of the Virginia financial aid community in an efficient, effective, and coordinated manner. Virginia's successful model could serve as the conceptual framework for other states.

VIRGINIA'S COORDINATED TRAINING MODEL

